Queen Mary
University of London

e-Appraisal System

Appraisee and Appraiser User Guide

Table of Contents

1 Completing the Appraisal Form.....2

2 Share and close the Form.....7

3 Finalising the Appraisal Form.....7

4 Print Friendly PDF.....8

5 Add Attachments.....8

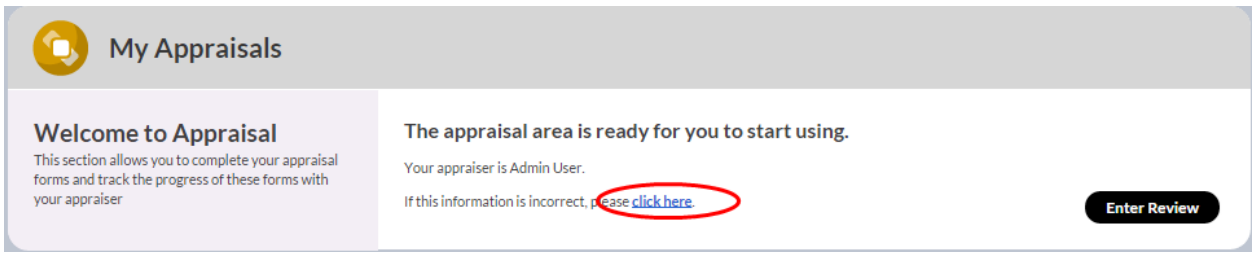
6 Notes.....9

7 Appraiser Process – My Team.....11

1 Completing the Appraisal Form

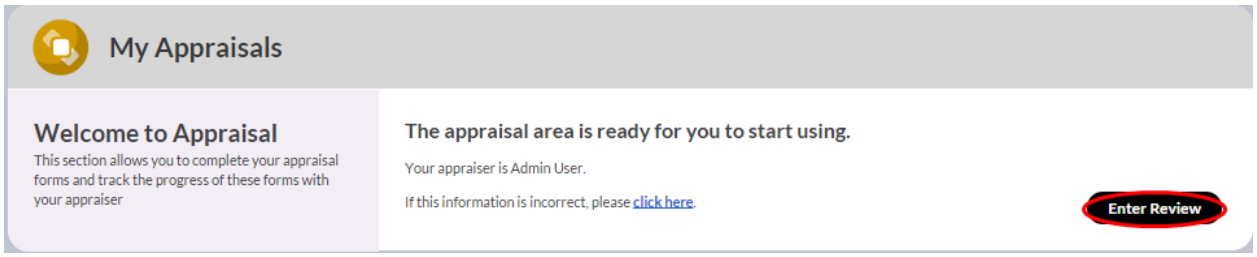
Once logged in to e-Appraisal system you will be navigated to the '**Me**' tab.

Go to the My Appraisals section at the bottom of the page to view who your appraiser is. If it is incorrect please click the "click here" link.

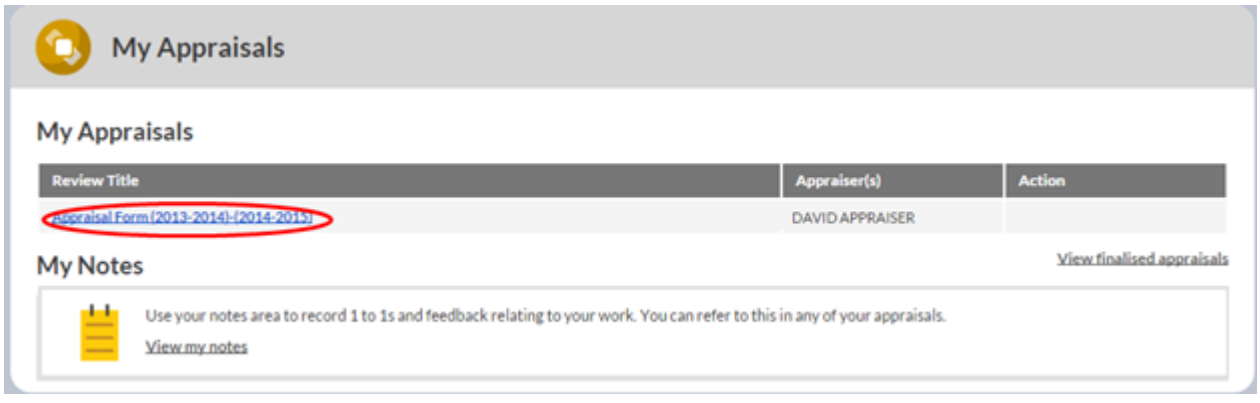

My Appraisals
Welcome to Appraisal
This section allows you to complete your appraisal forms and track the progress of these forms with your appraiser
The appraisal area is ready for you to start using.
Your appraiser is Admin User.
If this information is incorrect, please click here.
Enter Review

This will open up a Support window and you can update the box accordingly with the correct details. Once complete please click the "Submit" button and an email will be sent to the HR Systems Team.

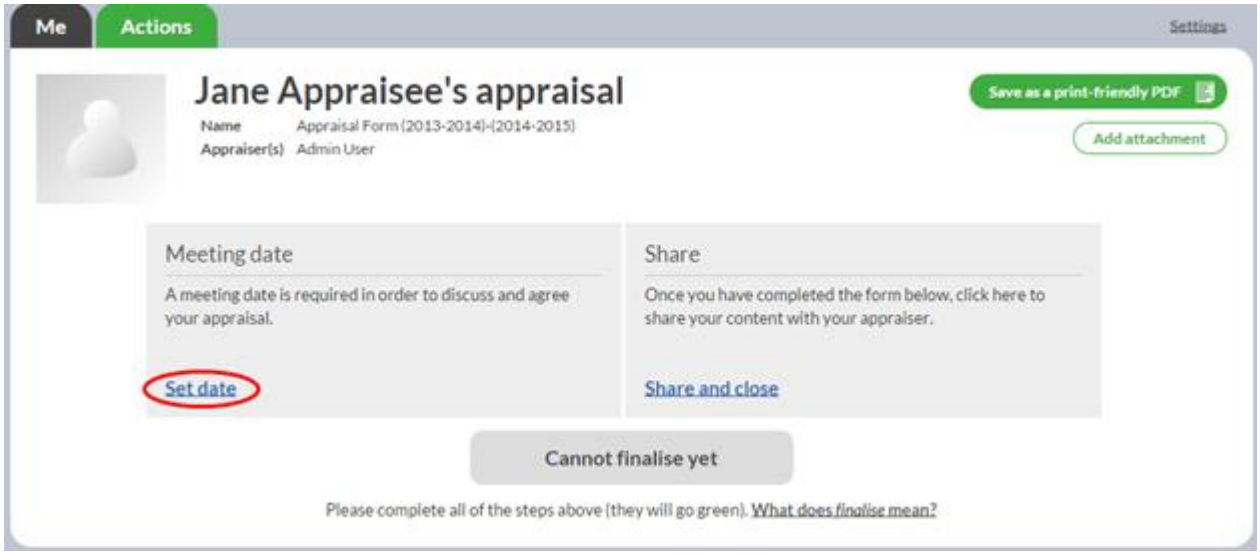
Assuming the details are correct, please click on the "Enter Review" button to generate the Appraisal Form.


My Appraisals
Welcome to Appraisal
This section allows you to complete your appraisal forms and track the progress of these forms with your appraiser
The appraisal area is ready for you to start using.
Your appraiser is Admin User.
If this information is incorrect, please click here.
Enter Review

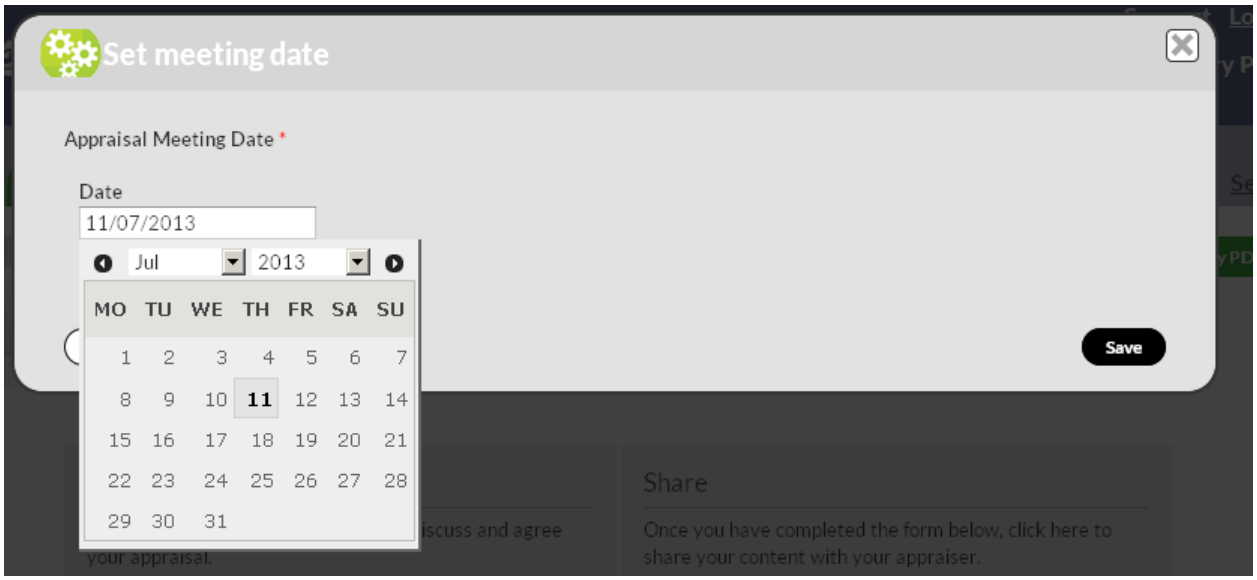
The screen will change to the following format. Click on the Appraisal Form link.


My Appraisals
My Appraisals
Review Title
Appraiser(s)
Action
Appraisal Form (2013-2014)-(2014-2015)
DAVID APPRAISER
My Notes
View finalised appraisals
Use your notes area to record 1 to 1s and feedback relating to your work. You can refer to this in any of your appraisals.
View my notes

Within the Meeting Date box, click on the “Set date” link.

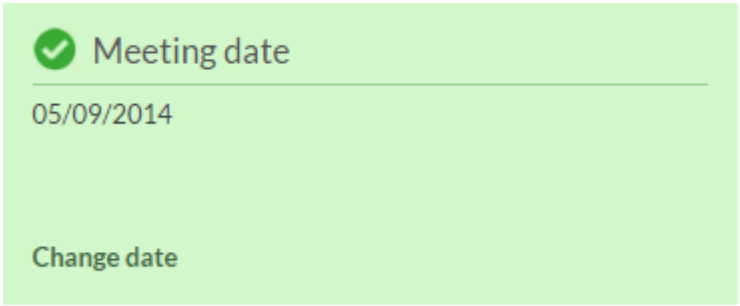

Me
Actions
Settings
Jane Appraisee's appraisal
Name Appraisal Form (2013-2014)-(2014-2015)
Appraiser(s) Admin User
Save as a print-friendly PDF
Add attachment
Meeting date
A meeting date is required in order to discuss and agree your appraisal.
Set date
Share
Once you have completed the form below, click here to share your content with your appraiser.
Share and close
Cannot finalise yet
Please complete all of the steps above (they will go green). What does finalise mean?

Click in the **Date** field, and enter or select an Appraisal Meeting Date, this can be entered before or after the actual meeting takes place. It is a mandatory field so must be populated to activate the process.


Set meeting date
Appraisal Meeting Date *
Date
11/07/2013
Jul
2013
MO TU WE TH FR SA SU
1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 31
Save
Share
Once you have completed the form below, click here to share your content with your appraiser.

Click **Save**.

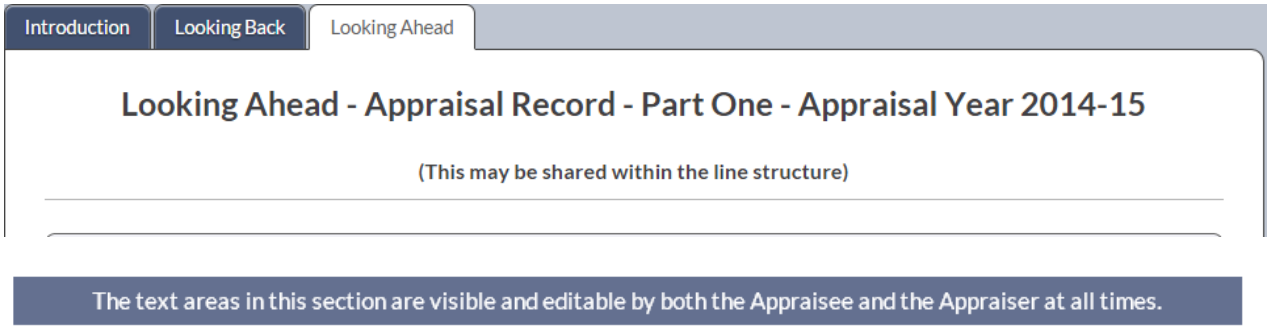
Once a meeting date is selected the Meeting Date box will turn green.



You may now complete the Appraisal Form.
Move or scroll down to the next section of the web page and there are three tabs available. The first tab is titled “Introduction” and will display the Appraisal Process Summary wheel with some brief guidelines underneath the wheel of how to complete the form. The second tab is titled “Looking Back” and will be the place for reviewing against the objectives agreed last year. Third tab is titled “Looking Ahead”, this is the tab we ask you to complete this year. Please click on the “Looking Ahead” tab

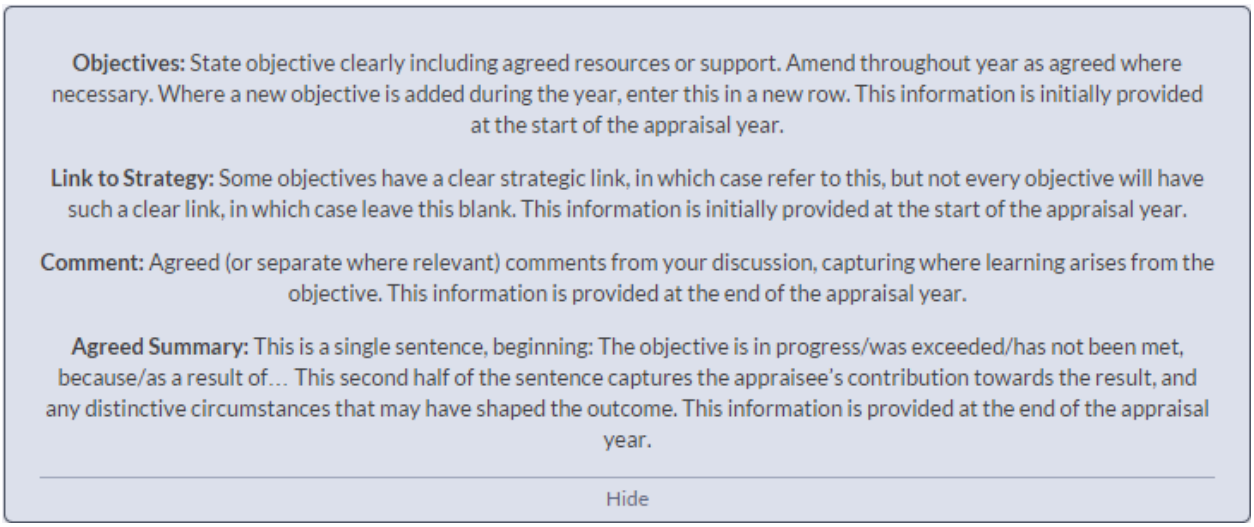
After you have clicked into the “Looking Ahead” tab the screen will look as follows, a title of the form will be displayed showing the appraisal period you will enter your appraisal content into.

Please note that several sections of the Appraisal Form are visible and editable by your Appraiser **at all times**. A reminder of this has been included on these sections for guidance.


Introduction
Looking Back
Looking Ahead
Looking Ahead - Appraisal Record - Part One - Appraisal Year 2014-15
(This may be shared within the line structure)
The text areas in this section are visible and editable by both the Appraisee and the Appraiser at all times.

Please enter your Work Objectives that have been agreed with your Appraiser.

For further help please click the symbol to display additional guidance.

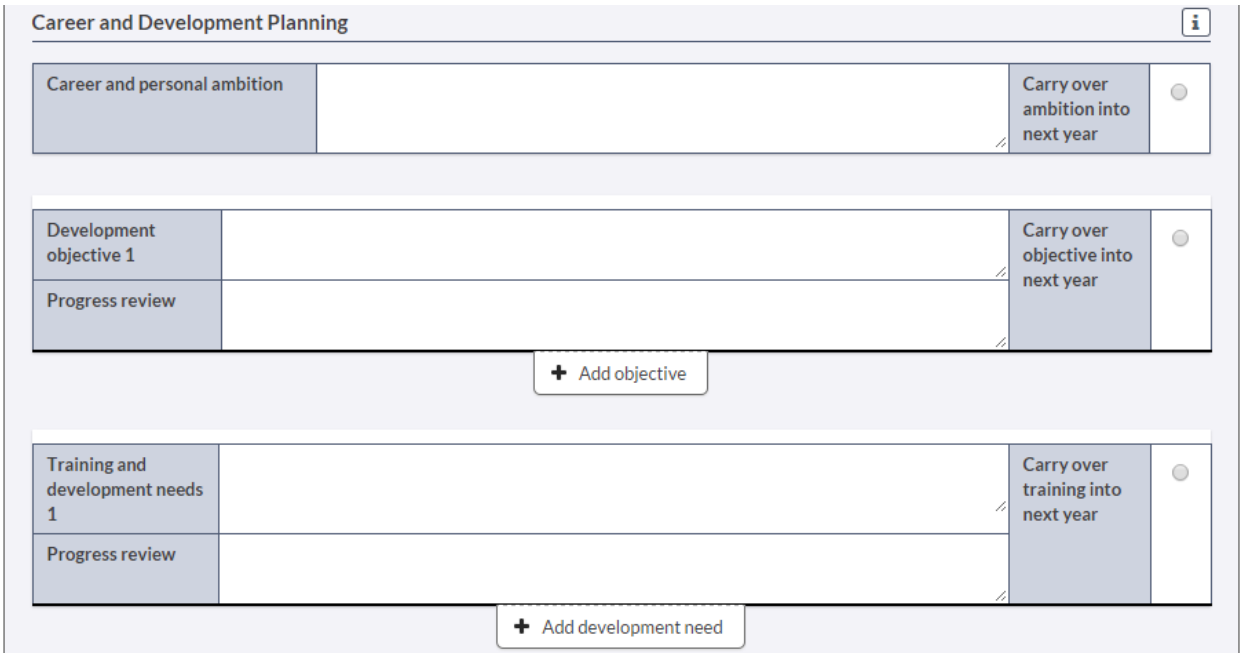

Objectives: State objective clearly including agreed resources or support. Amend throughout year as agreed where necessary. Where a new objective is added during the year, enter this in a new row. This information is initially provided at the start of the appraisal year.
Link to Strategy: Some objectives have a clear strategic link, in which case refer to this, but not every objective will have such a clear link, in which case leave this blank. This information is initially provided at the start of the appraisal year.
Comment: Agreed (or separate where relevant) comments from your discussion, capturing where learning arises from the objective. This information is provided at the end of the appraisal year.
Agreed Summary: This is a single sentence, beginning: The objective is in progress/was exceeded/has not been met, because/as a result of… This second half of the sentence captures the appraisee's contribution towards the result, and any distinctive circumstances that may have shaped the outcome. This information is provided at the end of the appraisal year.
Hide

Click the symbol again to close the help window

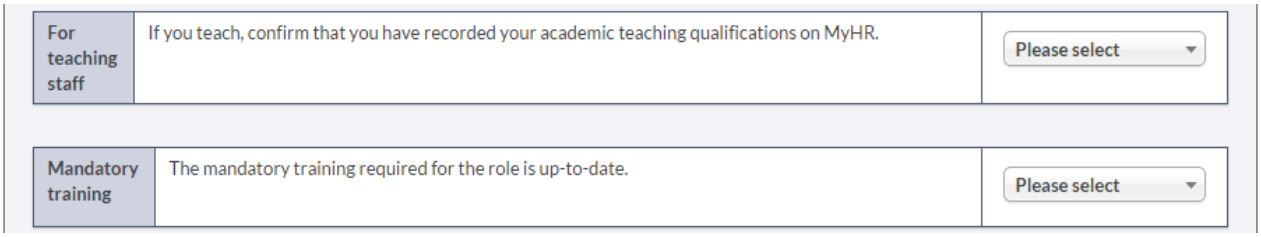
Once you have read through the help guide you may start to enter your Work Objectives and Link to Strategy (The “Comment” and “Agreed Summary” boxes will be updated at the end of the Appraisal Period, as per the Help menu), the boxes are free text fields and will auto-save your content each time you pause typing.
To add further Work Objectives, please click the “Add objective” under the boxes

Leave the “Additional Contributions” boxes. These are for completion next year, at the end of the appraisal cycle.

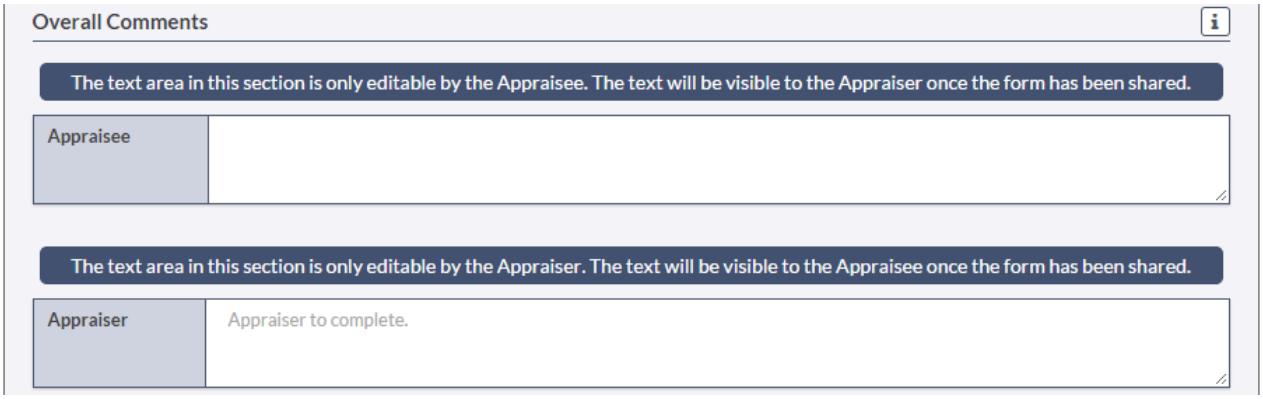
Complete the section(s) for Career and Development Planning, use the symbol to display help if required.



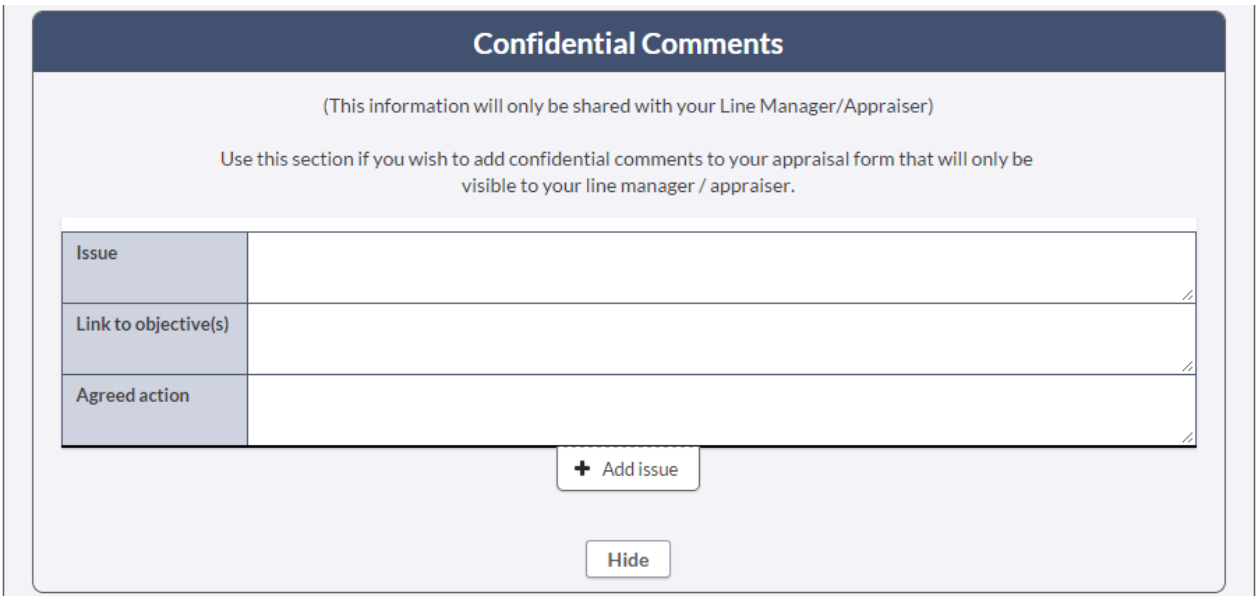
If you Teach then please select the appropriate Yes/No option from the drop down box, if you do not teach please select the “Not Applicable” option.
For Mandatory training please select one of the three options, if there isn’t any mandatory training for your Job role please select the “Not Applicable” option once again.


For teaching staff
If you teach, confirm that you have recorded your academic teaching qualifications on MyHR.
Please select
Mandatory training
The mandatory training required for the role is up-to-date.
Please select

The Overall Comments section for Appraisee is only editable by the Appraisee and cannot be edited by the Appraiser.
Similarly, the Appraiser section can only be edited by the Appraiser and not the Appraisee.


Overall Comments
The text area in this section is only editable by the Appraisee. The text will be visible to the Appraiser once the form has been shared.
Appraisee
The text area in this section is only editable by the Appraiser. The text will be visible to the Appraisee once the form has been shared.
Appraiser
Appraiser to complete.

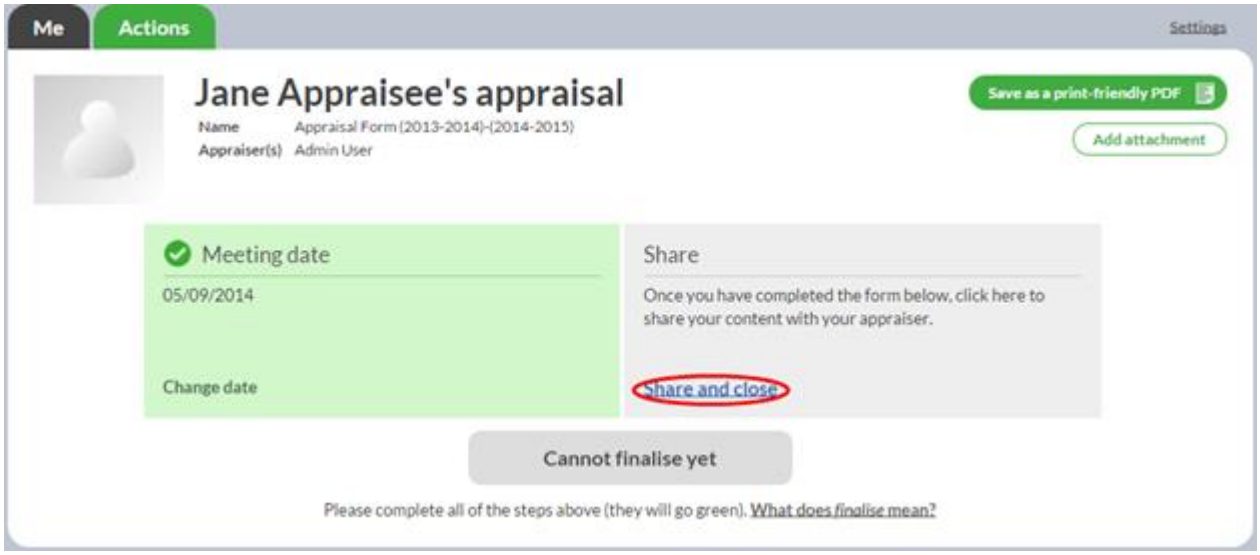
At the bottom of the form is a section for Confidential Comments that will only be visible to the appraisee and their immediate Line Manager/Appraiser. By default, the box will remain closed at all times.


Confidential Comments
(This information will only be shared with your Line Manager/Appraiser)
Use this section if you wish to add confidential comments to your appraisal form that will only be visible to your line manager / appraiser.
Issue
Link to objective(s)
Agreed action
Add issue
Hide

To save the form at any time click the “Save” or “Save and Close” icon in the bottom right- hand corner of the Appraisal form. This will Save the form and you can return to the Me page. This option will only save the form in DRAFT format only.

2 Share and close the Form

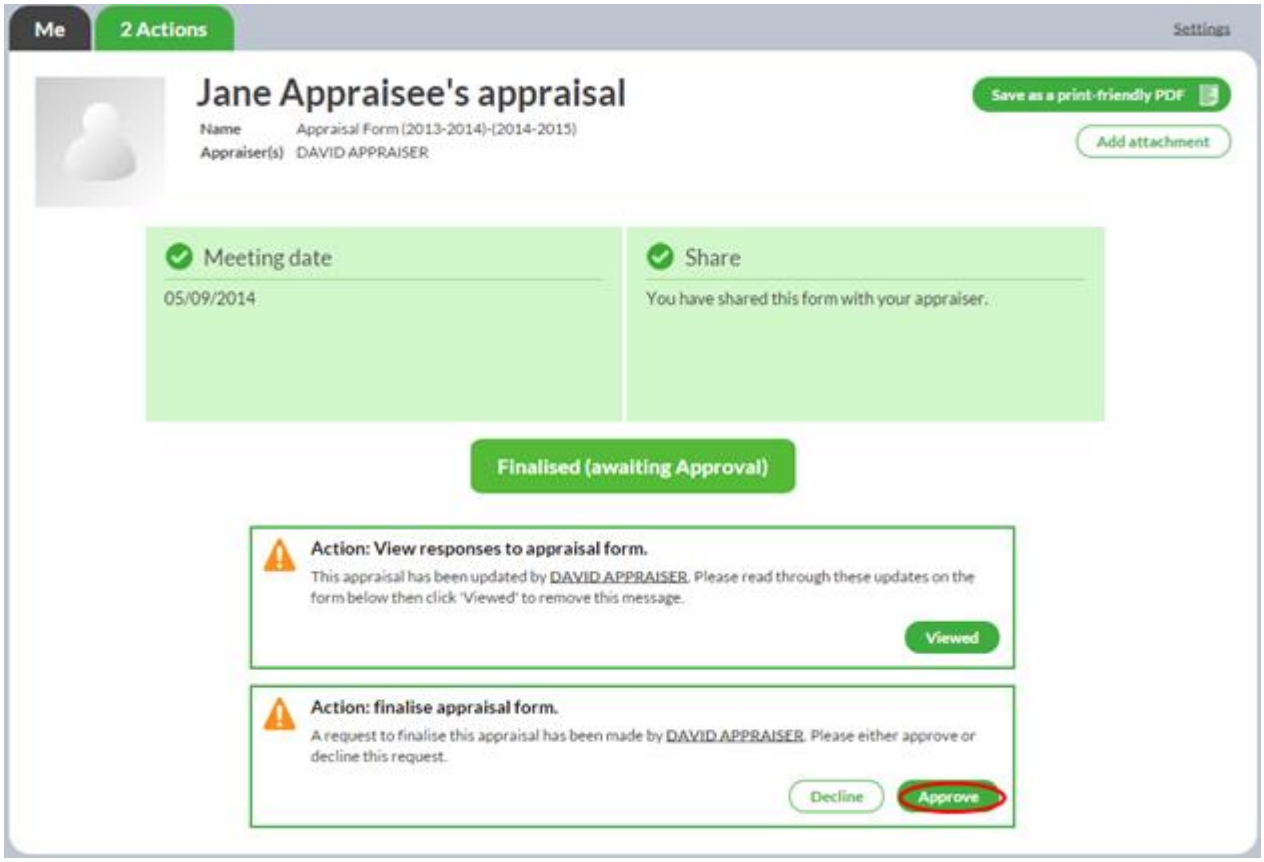
Upon completion of the form click “Share and Close” at the top of the page. This will create a notification to your Appraiser and enable them to view **all** form content.



3 Finalising the Appraisal Form

Either the Appraisee or the Appraiser can initiate the Finalisation process.

In this example the Appraiser has sent a Finalise action to the Appraisee, the finalisation process can be initiated by either the Appraiser or Appraisee. If you as the Appraisee agree with the final content you may click the Approve button. Only click Approve if you are in agreement with the final content, as the form will lock from further editing.

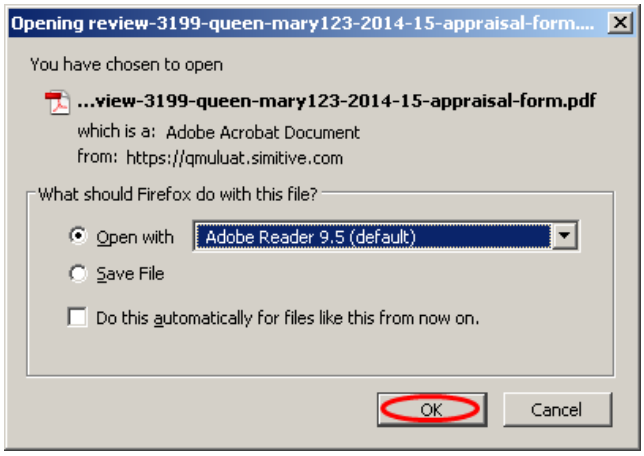

Me
2 Actions
Settings
Jane Appraisee's appraisal
Name Appraisal Form (2013-2014)-(2014-2015)
Appraiser(s) DAVID APPRAISER
Save as a print-friendly PDF
Add attachment
Meeting date
05/09/2014
Share
You have shared this form with your appraiser.
Finalised (awaiting Approval)
Action: View responses to appraisal form.
This appraisal has been updated by DAVID APPRAISER. Please read through these updates on the form below then click 'Viewed' to remove this message.
Viewed
Action: finalise appraisal form.
A request to finalise this appraisal has been made by DAVID APPRAISER. Please either approve or decline this request.
Decline
Approve

Please note that Finalising your Appraisal Form has been deactivated from day 1 of go live and will be activated nearer the end of the appraisal period when the Forms will then need to be finalised

4 Print Friendly PDF

On the right hand side of the Me page is a Save as a print-friendly PDF button, click the button to generate the PDF file.

It may take a few moments for the PDF to display, in Windows XP the window will appear on screen as follows. On Windows 8 machines, the PDF file will display bottom left of the Task Bar.

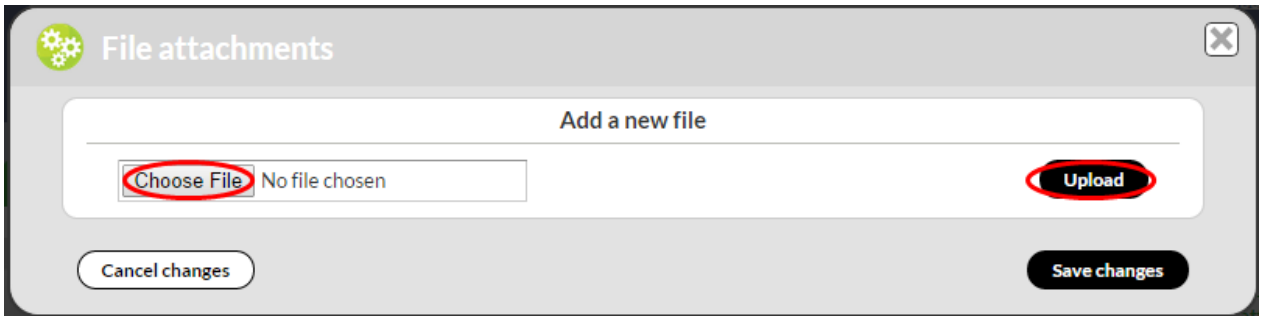


Click OK and the document will display in a PDF document that you can then save to your PC/network drive.

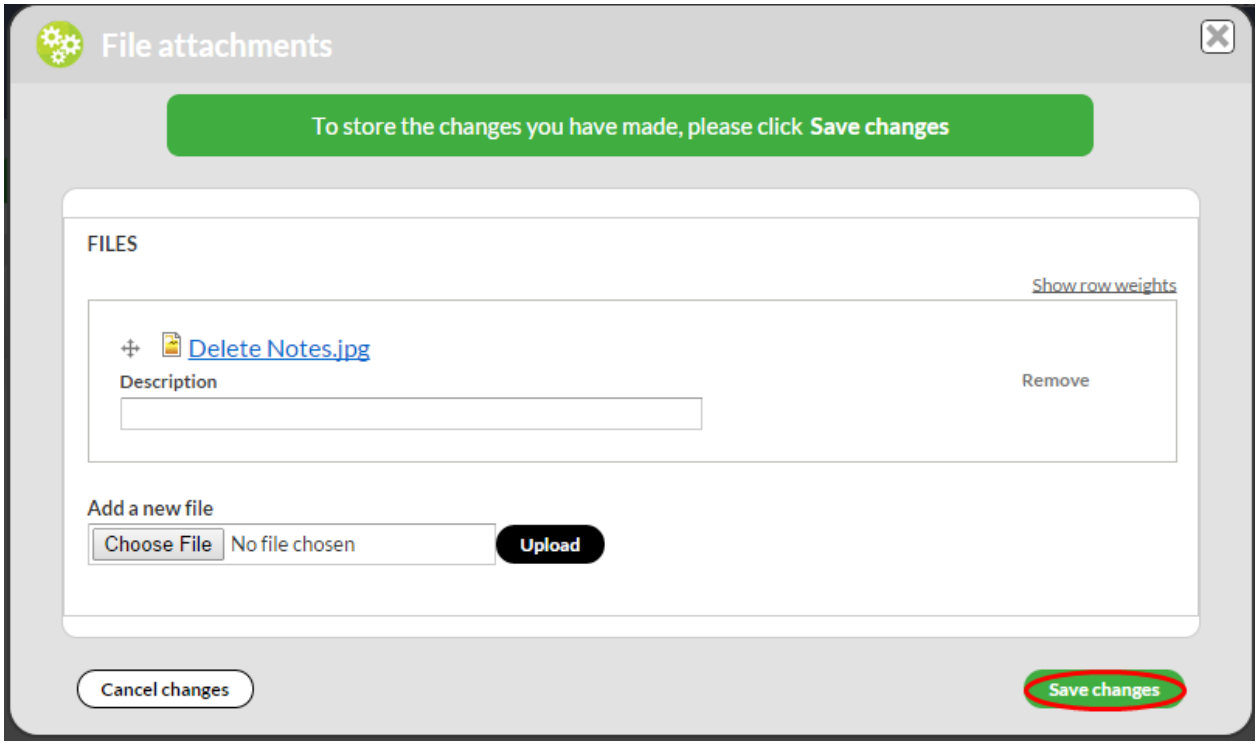
5 Add attachment

This will be useful for Appraisers whose staff do not have access to PC's/Laptops.

Click on Add Attachment, then click Choose File to select a file, then click Upload, allow the File to upload.



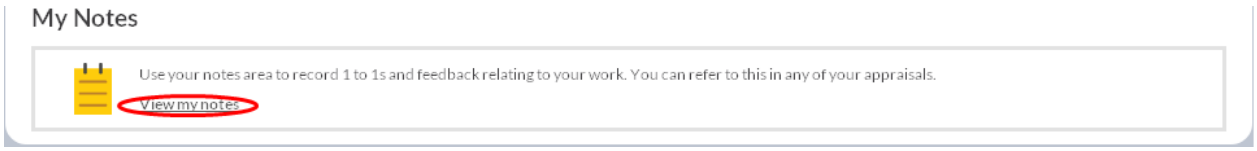
Once the File has Uploaded then click Save Changes to close the screen



From the Home screen the Add Attachment link has changed to the following where you can then click into the View/Edit to see the attachment that you saved.

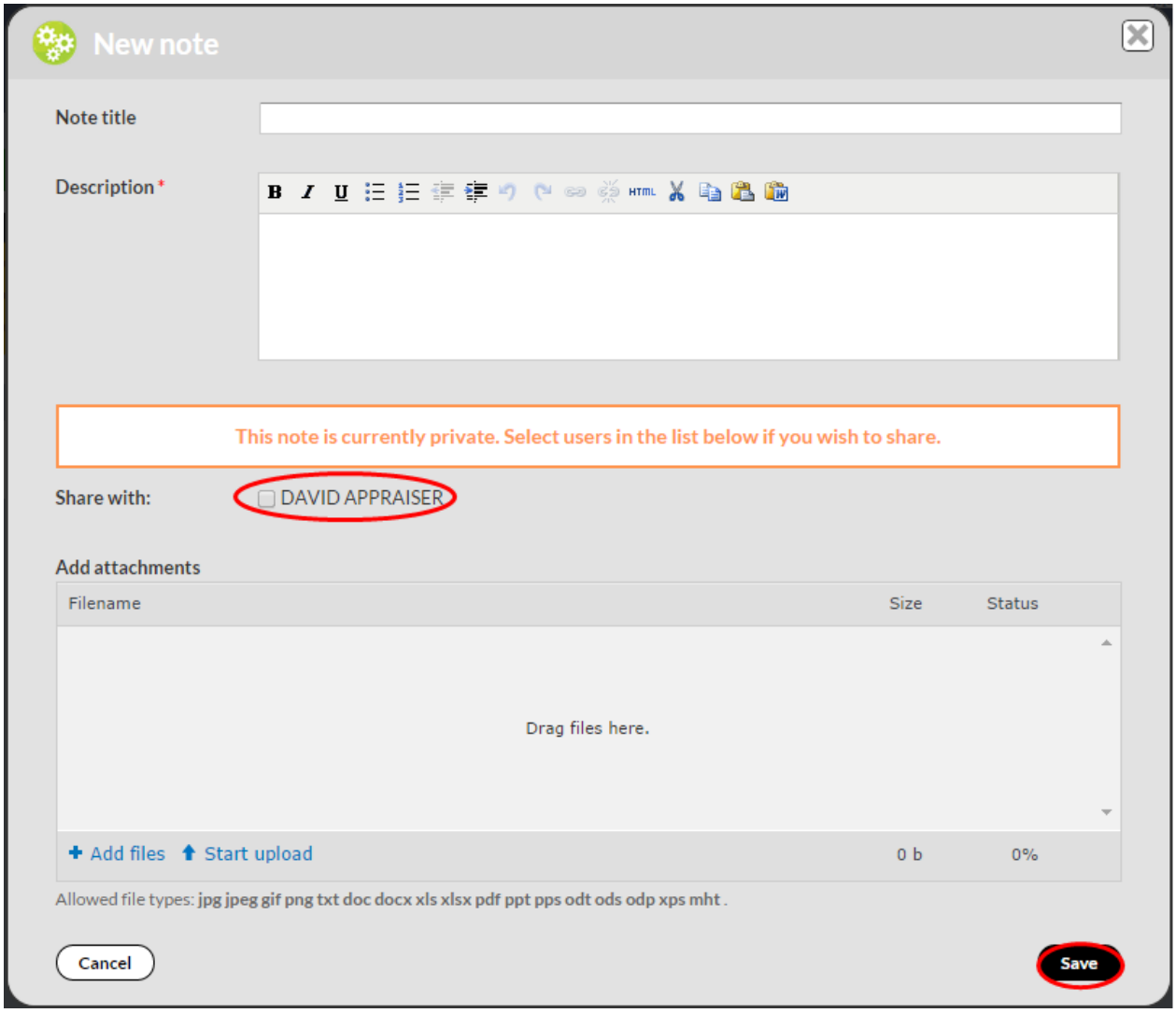
6 Notes

At the bottom of the Me tab, there is a Notes section where you may record feedback relating to your work. click View my Notes.


My Notes
Use your notes area to record 1 to 1s and feedback relating to your work. You can refer to this in any of your appraisals.
View my notes

Click Create new Note to record your feedback. You can also tick the Share With tick box to share your feedback with your Appraiser.

Click Save when finished



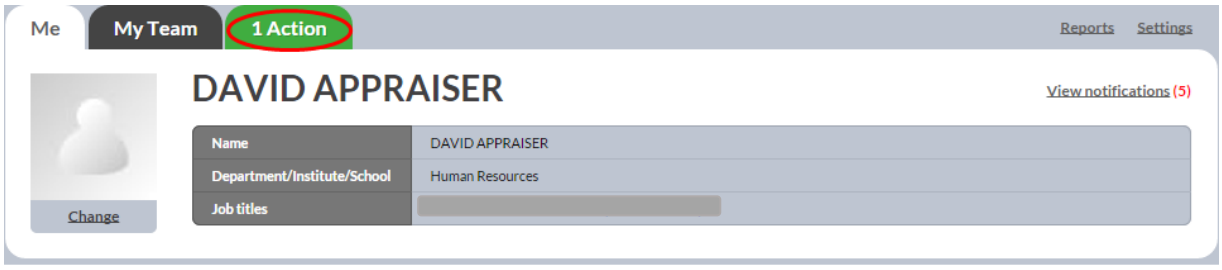
Please note that both the Appraisee and the Appraiser can share notes in this section, with both being able to share the note with each other.

Appraiser Process

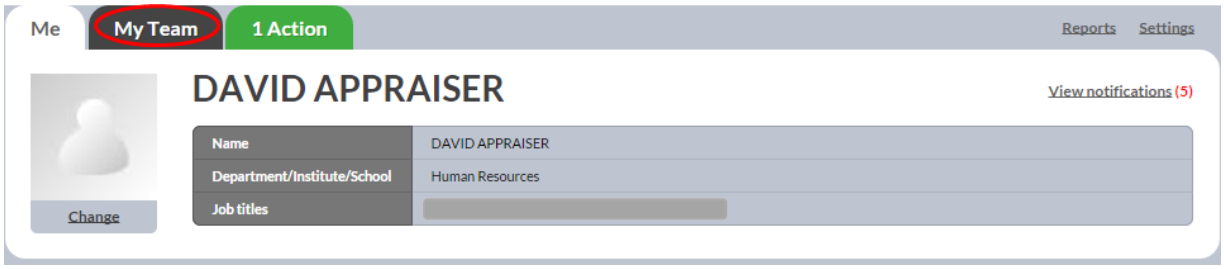
1 My Team

As an Appraiser the screens you access are the same as an Appraisee, with the exception of having an extra Tab on your profile called My Team.
From the My Team tab you can select the Appraisees you are responsible for Appraising.
When an Appraisee updates their Appraisal Form you will receive Actions and/or Notifications from them.
These Actions will be displayed on the Me tab or on the Appraisal Form itself.

You can also click on the Action tab in green or you can go to the My Team tab and select the Appraisee from there to view the Appraisal Form.

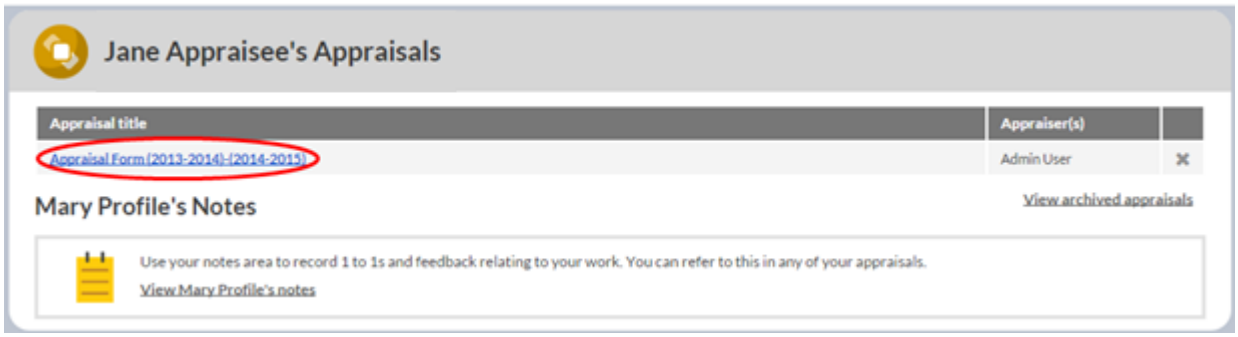


To view an Appraisal Form for your Appraisee click on the My Team tab.

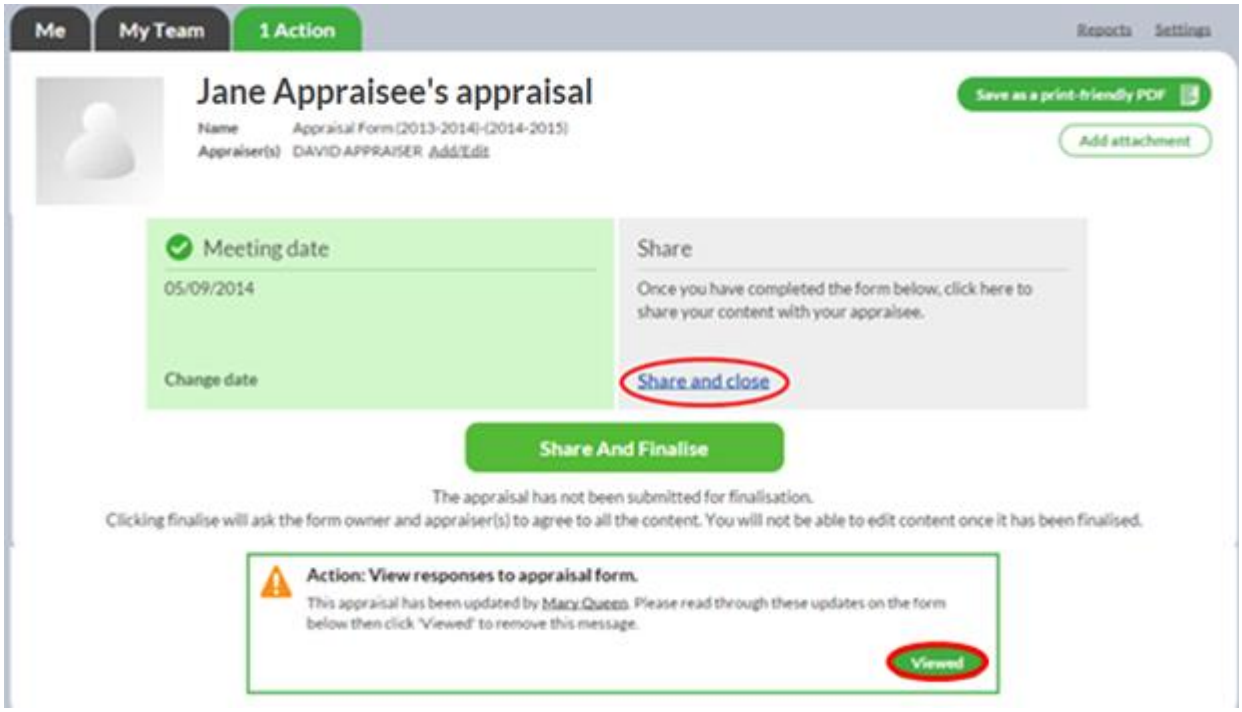


Then select an Appraisee by clicking on their name.

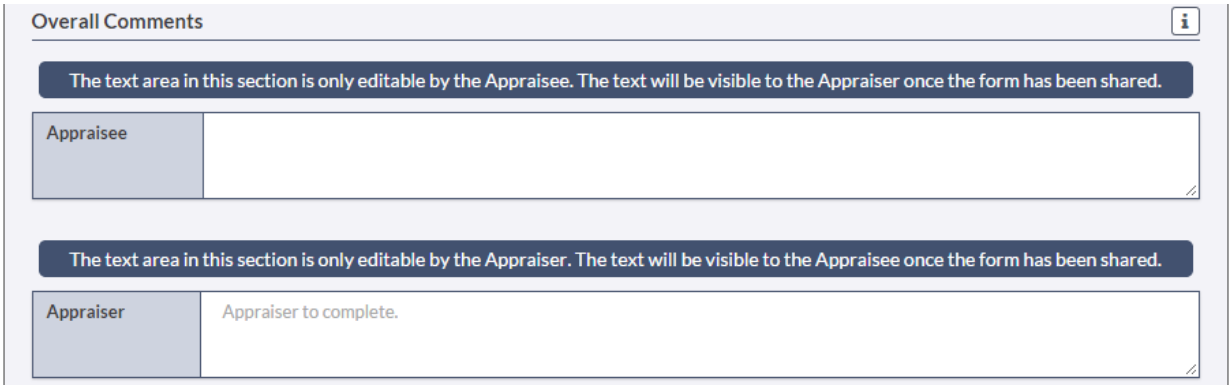
The available Appraisal Forms will be displayed in the Appraisals section, please click on the relevant Appraisal Period


Jane Appraisee's Appraisals
Appraisal title
Appraiser(s)
Appraisal Form (2013-2014)-(2014-2015)
Admin User
Mary Profile's Notes
View archived appraisals
Use your notes area to record 1 to 1s and feedback relating to your work. You can refer to this in any of your appraisals.
View Mary Profile's notes

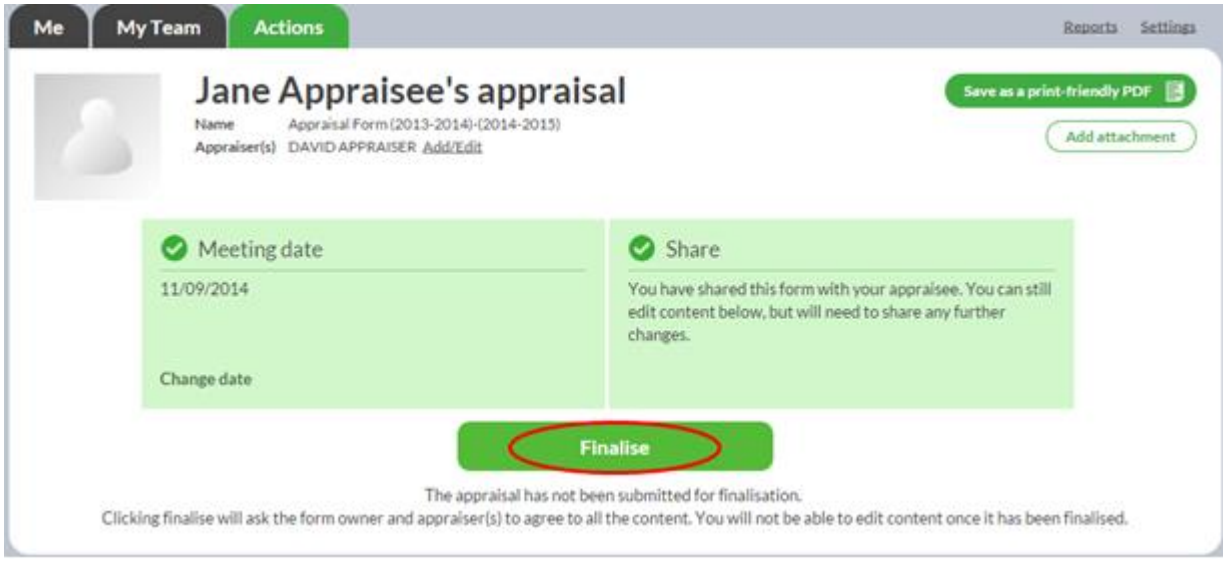
Once the Appraisee has updated the content of the Appraisal Form and clicked Share and Close, the Appraiser will receive a Notification requesting the Appraiser view the form.
You will now be able to add content and then Share and Close to enable the Appraisee to view the content you have updated.


Me
My Team
1 Action
Reports
Settings
Jane Appraisee's appraisal
Name
Appraisal Form (2013-2014)-(2014-2015)
Appraiser(s)
DAVID APPRAISER Add/Edit
Save as a print-friendly PDF
Add attachment
Meeting date
05/09/2014
Change date
Share
Once you have completed the form below, click here to share your content with your appraisee.
Share and close
Share And Finalise
The appraisal has not been submitted for finalisation.
Clicking finalise will ask the form owner and appraiser(s) to agree to all the content. You will not be able to edit content once it has been finalised.
Action: View responses to appraisal form.
This appraisal has been updated by Mary Queen. Please read through these updates on the form below then click 'Viewed' to remove this message.
Viewed

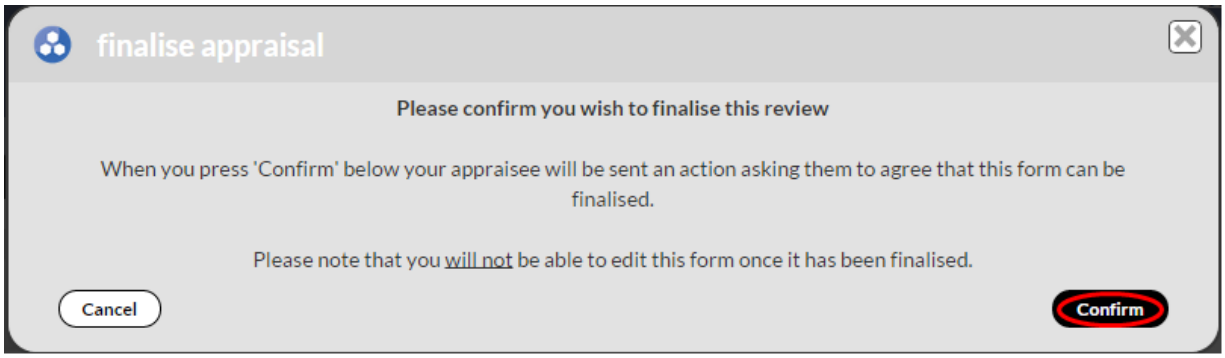
Near the bottom of the Appraisal Form there is an Overall Comments section containing two boxes, one box for an Appraisee to edit only and one box for the Appraiser to edit only.


Overall Comments
The text area in this section is only editable by the Appraisee. The text will be visible to the Appraiser once the form has been shared.
Appraisee
The text area in this section is only editable by the Appraiser. The text will be visible to the Appraisee once the form has been shared.
Appraiser
Appraiser to complete.

Once the Appraisee and the Appraiser have Shared and Closed the form, this back and forward process may continue until such time that both parties will agree on the final content.
Once agreed the content of the Appraisal Form can be Finalised, click the Finalise option


Me
My Team
Actions
Reports
Settings
Jane Appraisee's appraisal
Name
Appraisal Form (2013-2014)-(2014-2015)
Appraiser(s)
DAVID APPRAISER
Add/Edit
Save as a print-friendly PDF
Add attachment
Meeting date
11/09/2014
Change date
Share
You have shared this form with your appraisee. You can still edit content below, but will need to share any further changes.
Finalise
The appraisal has not been submitted for finalisation.
Clicking finalise will ask the form owner and appraiser(s) to agree to all the content. You will not be able to edit content once it has been finalised.

A Window will appear confirming if you wish to finalise, click Confirm to send an Action back to the Appraisee.


finalise appraisal
Please confirm you wish to finalise this review
When you press 'Confirm' below your appraisee will be sent an action asking them to agree that this form can be finalised.
Please note that you will not be able to edit this form once it has been finalised.
Cancel
Confirm

This returned action by the Appraiser will allow the Finalisation process to be activated and either an Appraisee or an Appraiser can finalise the form.
Once the finalisation process has been initiated by one party, the process will require the other party to Finalise to complete the process.
The Finalisation process should only be completed towards the end of the Appraisal Cycle.